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ABSTRACT

A pilot program, the Career Ladder Plan, was developed in Kentucky to evaluate a teacher's performance in terms of professional growth and development and professional leadership/initiative based on that teacher's performance on a setting/goal attainment process. Goals jointly selected by the teacher and his/her principal must contribute to school improvement, instructional improvement of the teacher and/or other assigned responsibilities. A process was felt to be needed to reward teachers, enhance instruction practices and maintain teachers within the profession. Statewide consistency demanded the creation of a well-defined and well-organized procedure. Goals and activities have been identified, validated and weighted based on a sampling of over 1,611 Kentucky teachers and administrators. An instrument and process was developed to enable principals and teachers to identify relevant goals, select activities designed to meet those goals, and undertake a goal setting/achievement contract. Fundamental to success is the relevance of goals which participants must recognize as worthwhile and be willing to dedicate both the effort and time necessary for their attainment. Consistent assignment of activities to particular goals did relate to attainment of those goals. Conclusions are that the instrument and process should offer a vehicle for attainment of professional growth and development of professional leadership and/or initiative. (Author/RR)

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DEVELOPMENT OF A GOAL SETTING PROCESS AND INSTRUMENTATION FOR TEACHERS AND PRINCIPALS

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The lack of opportunity for professional growth has been identified as a crucial variable in the decision-making process of teachers considering leaving the profession (Rosenholtz and Smylie, 1984). Furthermore, this perceived lack of opportunity for professional growth and development among teachers tends to lower expectations and promote a sense of being trapped (Jenkins, 1983). In an attempt to overcome the effects reflected by perceived lack of opportunity for professional growth, in 1985 the Governor of the Commonwealth of Kentucky appointed a committee to explore the development of a Career Ladder Plan which would not only reward outstanding teachers and upgrade teacher performance in needed areas, but would also incorporate elements directly pertaining to professional growth and leadership.

The Report of the Kentucky Career Ladder Committee submitted on July 1, 1985, specified four factors to be included in the evaluation process for career advancement: Instructional Performance, Professional Growth and Development, Professional Leadership/Initiative, and Student Achievement. The focus of this paper is the development of the evaluation process for the specific areas of Professional Growth and Development and Professional Leadership/Initiative.

The Career Ladder Committee determined that evaluation of a teacher's performance in the areas of professional growth and development and professional leadership/initiative should be based on that teacher's performance in some sort of goal setting/goal attainment process. This process was to be determined during the developmental and pilot phases of the Career Ladder. Further, it was determined that goals to be included in the process should be jointly selected by the teacher and his/her principal and should contribute to school improvement, instructional improvement of the teacher, and/or other assigned responsibilities. The Career Ladder Program indicated two levels (Steps Three and Four) in which these categories were to contribute to the teacher's total evaluation.

The literature pertaining to professional growth and development and professional leadership and the inclusion of these variables in existing career ladder programs was reviewed. Little (1982) identified particular "critical practices" or teacher behaviors which tended to contribute to school success. Included in these practices were professional development activities as well as leadership behaviors exhibited by experienced teachers. The importance of professional development and leadership behaviors was also substantiated in studies by Rosenholtz and Smylie (1984), Fenstemacher (1982), and the U.S. Department of Education (1986). Furthermore, a survey of various current career ladder programs and those in process of being instituted as well as other incentive plans

(e.g., the Charlotte-Mecklenburg, North Carolina Career Development Program) indicated that almost all plans included some sort of professional development and/or leadership component. However, the Kentucky Career Ladder Program differs from many of the other programs in that it attempts to quantify the goals and activities selected as part of the process. This paper describes the methodology employed to develop and implement this process and the findings to date. The review of literature was organized into the following sections: Related Studies, Existing Career Ladder Programs and Goal Setting Rationale.

Related Studies

Due to the organization of most schools, one of the greatest impediments identified in the development of teaching skills was professional isolation. Only a small amount of professional interaction took place among teachers in most school settings. Therefore, skill acquisition was limited almost entirely to trial and error learning. This isolation also meant that beginning teachers had no models of excellence among their colleagues. The absence of interaction limited the beginner's likelihood of learning any pre-existing body of practical knowledge (Rosenholtz and Smylie, 1984). The process of organizing, systematizing, and transmitting this body of knowledge and skills that could effectively distinguish an educator from a non-educator should be at the center of professional practice (Jenkins, 1983).

In successful schools, where student learning exceeded predicted levels of achievement, the prevailing attitude was that improving one's teaching was a collective rather than an individual enterprise (Rosenholtz and Smylie, 1984; Little, 1982). Yet, it was found that those individuals who were in a position to impart those skills, i.e., those teachers with high verbal skill and intellectual ability who were most likely to be successful in the classroom with students, were also the least likely to remain in teaching (Schlechty and Vance, 1981). Among the specific reasons that teachers gave for leaving the profession was lack of opportunity for professional growth (Rosenholtz and Smylie, 1984; Jenkins, 1983).

The question of primary concern was to identify activities that contributed to the professional growth and development of teachers and at the same time benefited students. Little (1982) attempted to identify the differences between six successful and unsuccessful urban schools by classifying types of teacher interaction and involvement in school-wide projects of staff development. Successful schools were those in which student achievement exceeded predicted levels. Little concluded that continuous professional development appeared to be most surely and thoroughly achieved when four conditions were met: (1) teachers engaged in frequent, continuous, and increasingly concrete and precise talk about teaching practices; (2) teachers were frequently observed and provided with useful critiques of their teaching; (3) teachers planned, designed, researched, evaluated, and prepared teaching materials together; and (4)

teacher's taught each other the practice of teaching (Little, 1982). In the successful schools all four of these "critical practices" occurred regularly in situations ranging from training sessions and faculty meetings to the hallways and teachers' lounge. Little identified some of the specific practices that contributed to success. These included designing and preparing materials, researching materials and ideas for curriculum, analyzing various practices and their effects, teaching others in both formal in-service and informally, and converting book chapters to reflect new approaches, e.g., Mastery Learning.

Other studies, such as the one by Rosenholtz and Smylie (1984), suggested that formal specifications of helping roles, where the most effective teachers provided technical assistance to younger or less experienced colleagues, resulted in greater rewards for teachers, less attrition from teaching and greater gains in student learning. The importance of professional development and leadership was again borne out in a U.S. Department of Education study in which it was determined that more effective schools set aside time for faculty interaction and provided opportunities for faculty to work together on tasks such as setting school policies, improving instructional practice, selecting textbooks, and strengthening discipline (U.S. Department of Education, 1986).

Existing Career Ladder Programs

A survey of current and proposed career ladders and other types of incentive plans in other states substantiated that

almost all plans included some professional development and professional leadership component. One well known plan, the Tennessee Career Ladder/Better Schools Program listed several objective criteria that were designed to indicate competence in the area of professional development and professional leadership.

In the area of professional development the evaluative criteria included taking formal coursework related to assignment or advancement; participation in non-required staff development activities; use of ideas from books, professional journals, and professional organizations to enhance classroom instruction; trying new methods or approaches in the classroom and evaluating their success; and utilizing community resources to enhance classroom instruction. The criteria that were enumerated under this plan to indicate professional leadership abilities included conducting workshops or training sessions; creating materials or programs and sharing with others; holding a leadership position in an educational organization; assisting in establishing school goals; taking an active role in resolving school problems; promoting parent and community interest in the school; sharing materials and resources with peers; assisting peers and others in identifying and solving instructional problems; and working cooperatively with peers, administrators, and community members in planning and implementing curricular and extra-curricular activities (Tennessee Department of Education, 1985).

The Charlotte-Mecklenburg, North Carolina Career Development Program (1984) was another plan which was reported

to show a great deal of promise as a fair and effective measure of teacher's performance. The professional development and professional leadership criteria of this plan were based on the assumption that teachers must participate actively in the generation of new professional knowledge and must pass on to new teachers the best available knowledge about the art and science of teaching.

The activities that the outstanding teacher must have participated in included serving as a professional role model, supporting the development of new knowledge about teaching and learning, transmitting and explaining existing knowledge to new teachers and others in the school community, and using research based knowledge to evaluate current practice. The specific activities that were considered important in evaluating these general areas included communicating effectively with staff, parents, and students concerning particular areas of expertise; participating in planning, implementing, and evaluating school programs; participating in activities designed to enhance the school and to achieve its goals; participating in research and developmental activities to improve instruction, such as the creation and testing of alternative curriculum materials and strategies; and maintaining an awareness of trends and issues addressed by professional organizations and becoming involved, when appropriate, in addressing those issues (Charlotte-Mecklenburg Schools, 1984).

The State of Florida used a slightly different approach for the measurement of professional development and leadership.

This area was included on an Additional Evaluation Points Instrument by which additional points were awarded for categories which were not measured on the performance observation instruments or the subject area tests used in the Master Teacher Program. The recommendation of additional points by the school principal would indicate that the principal considered the candidate's performance in one or more of the following categories, which reflected similar activities found in other plans, to be superior: (a) making a positive contribution to the effectiveness of the school through participating in working committees; (b) voluntarily sponsoring student groups; (c) preparing students for public appearances; (d) using personal time to enhance the instructional program; (e) voluntarily engaging in in-service activities, university courses, and other training activities; (f) demonstrating new skills and knowledge from reading or other self-improvement activities; (g) working harmoniously with peers and support staff; (h) promoting a positive image of the school and the profession; and (i) contributing to the specific achievement of students including academic/sport team championships, awards for academic excellence, awards for good citizenship, and other student achievements (State of Florida, Department of Education, 1985).

The State of Utah's approach to a career ladder plan differed from that used by most other states, the criteria were determined by individual school districts following general guidelines established by the State. The local plans used

diverse lines of evidence to evaluate teachers, but among the most frequently cited were various measures of professional growth and professional leadership. Measures included awards, certificates of recognition, grades from college courses, and attendance at in-service activities (Utah State Board of Education, 1985).

All of the southern states included in a survey conducted by the Southern Regional Education Board (1984a) placed an emphasis on professional growth or leadership as a part of their evaluation process. North Carolina candidates were required to show evidence of professional growth which was defined as continuing education units, graduate course work, or other evidence of continued self-initiated professional growth. Under the Virginia plan, master teachers must have assumed leadership roles such as department supervision, curriculum development, material selection, teacher mentoring, educational research, school policy development, or professional development activities. In Texas, master teacher duties included supervising student teachers, acting as team leader, mentor, or department chairperson. According to Georgia's proposed plan, the career teacher would be required to demonstrate evidence of involvement and participation in school or district leadership activities and provide evidence of engagement in professional development activities.

Other states such as Idaho, Colorado, Massachusetts, and Maryland had leadership responsibilities under consideration for their proposed incentive plans. Among those considered were

chairing an academic department, working on in-service efforts, and curriculum development (Southern Regional School Board, 1984b).

Goal Setting Rationale

The establishment of goals toward which an individual can work promotes higher levels of performance. Goal setting is most effective when careful guidelines for determining performance effort are established beforehand. In addition, goals are more effective when the following conditions are met: First, the individual must be aware of the goal and know what must be accomplished in order to achieve that goal. Second, the individual must accept the goal as something worth working toward. Third, the goal should be specific, and fourth, feedback must be provided reflecting whether or not the behavior was on target. Empirical evidence consistently indicates that specific, challenging goals produce better performance than no goals, easy goals, or very general goals (Locke, Shaw, Saari, and Latham, 1981).

The Kentucky Career Ladder Commission perceived encouraging teachers to pursue professional development and professional leadership as important. The literature reviewed indicated that when teachers failed to pursue goals they often became disillusioned and left the teaching profession. Teachers who attempted to attain professional development and accepted leadership positions in the process became more effective teachers and their students benefited from their expertise. Examples of activities which contributed to professional growth

and development were identified in the literature. Numerous states have recognized the importance of including professional development and professional leadership as parts of their incentive plans. In conclusion, an effective combination of relevant goals, specific activities designed to meet those goals, and a process for goal setting and attainment should enhance an educational career ladder program.

The Purpose

The purpose of this project was to develop goals for two areas of teacher development, professional growth and development and professional leadership and/or initiative. In addition, the purpose included identifying exemplar activities that could be undertaken to accomplish these goals. Professional growth and devlopment was operationally defined as the ability and willingness to undertake self-improvement activities related to increasing one's professional knowledge and skills as demonstrated through performance on the job. Professional leadership and/or initiative was operationally defined as the ability and willingness to effectively use one's knowledge and skills through conducting or engaging in activities designed to facilitate the development of curricula, other professionals, and student and community programs.

Specifically, the final product will include a process by which to judge goal setting and goal attainment that can be used by teachers and administrators for teacher evaluation. Care was taken to ensure that sound psychometric practice was followed so the resulting instrument would be reliable and valid.

Method

Population

The population, for validation purposes, was composed of random samples drawn from all Kentucky teachers and administrators. A total of 1650 individuals were asked for input during the development and validation process. A panel of teachers, administrators, and university faculty members was selected to serve as a steering committee for the project. Representative school districts across the state of Kentucky volunteered to pilot the instrument during the 1986-87 school year.

Procedure

Identification and validation of an appropriate set of goals was arrived at by using standard psychometric item selection and rating techniques. Steps required for this type of goal development activity process and a description of the procedure implemented under each follows.

Development of Goal Statements. The initial step was to identify goals for each of the two teaching areas under consideration: (a) Professional Growth and Development and (b) Professional Leadership and/or Initiative. The literature was reviewed and analyzed and input was obtained from a panel of 20 teachers, administrators, and university faculty members. Potential goals were selected, combined, and refined to provide an initial list of 13 goals for professional growth and development and 11 for professional leadership and/or initiative.

Validation of Goal Statements. When developing any instrument such as the goal setting instrument, it is important to establish content validity. That is, to establish that the goals for each area are a representative and adequate sample of the domain of applicable goals. Standards for the development of psychometric instruments indicate that content validity is an important criteria for such norm-referenced achievement measures (Standards; APA, AERA, and NCME; Anastasi, 1976; Brown, 1976) as well as criterion-referenced measures (Hambleton & Novick, 1973). Furthermore, federal regulations indicate that content validity is an important property of instruments used for professional certification and employee selection and classification (EEOC, 1978; FEA, 1976).

The goals for each area were mailed out to 825 randomly selected teachers and administrators who were asked to make two evaluations of each goal: (1) determine how ESSENTIAL each goal is to that professional area (Lawshe, 1975), and (2) determine the DIFFICULTY of achieving each goal listed under each area. (Ratings of the difficulty of each goal were obtained at this time even though these ratings were not used until the next step in the process.) These ratings were obtained to ensure that the selected goals indeed reflected the important aspects of Professional Growth and Professional Leadership and to provide a data base for later developing the evaluation process.

Essentiality ratings were made on a 5-point Likert scale such that for each goal the respondent was asked to decide whether that goal is:

1 - NOT NECESSARY for attaining "Professional Growth and Development."

3 - USEFUL BUT NOT ESSENTIAL for attaining "Professional Growth and Development."

5 - ESSENTIAL for attaining "Professional Growth and Development."

Responses from this survey, including suggestions from the teachers and administrators, were used to refine the list of goals for both areas. The essentiality ratings reflect the content validity of the goals. A relatively low standard deviation indicates that the raters agree in their assessment of the essentiality of the goal and a relatively high mean essentiality rating indicates that the goal is considered to be critical for effective performance in the given area (Smith & Kendall, 1963). A criterion of a standard deviation of less than 1.2 and mean essentiality rating of greater than or equal to 3.5 was determined for retention on the list of goals. No goals were dropped from the list using this screening process. Two goals in each area were combined based on comments from the raters and the fact that the goals in question had almost identical mean ratings and standard deviations. The resulting list of goals for each area follows:

PROFESSIONAL GROWTH AND DEVELOPMENT

1. To incorporate knowledge of current educational research and development into instructional practices by using ideas from professional books, journals, and/or professional organizations.
2. To develop, implement, and verbalize a personal educational philosophy consistent with current knowledge.
3. To adapt instructional techniques to the demonstrated instructional needs of the individual student.

4. To increase understandings of current concepts and theories as they relate to the teacher's subject area and job assignment.

5. To improve classroom management and organization skills.

6. To increase interpersonal and communication skills.

7. To increase understandings of different socio-economic, ethnic, and cultural groups.

8. To improve personal diagnosis and evaluation skills in order to ascertain instructional levels and needs of learners.

9. To obtain graduate degree(s) and/or receive course credit directly related to the individual teacher's assignment.

10. To attend workshops, seminars, and/or professional development activities directly related to the individual teacher's assignment.

11. To try new methods/approaches in the classroom and evaluate their success.

12. To seek and utilize community resources to enhance classroom instruction.

PROFESSIONAL LEADERSHIP/INITIATIVE

1. To conduct workshops or training sessions designed to increase knowledge and skills of others.

2. To create materials or programs and share with peers and/or administrators.

3. To effectively serve in a leadership position in the school district and/or professional organization.

4. To take an active role in the identification and resolution of instructional problems and other school-related problems.

5. To initiate and implement activities and projects in the school.

6. To assist in establishing school goals and take an active role in achieving them.

7. To work cooperatively with peers, administrators, and community member in planning and implementing curricular and extra-curricular activities.

8. To provide a leadership model and foster professionalism through demonstrating/modeling leadership techniques.
9. To foster the development of leadership skills for students in the classroom through demonstrating a personal leadership model.
10. To promote parent/community/interest in the school.

Development of Goal Attainment Activities. Again the literature was reviewed and teachers and administrators were consulted to identify exemplar activities for each goal statement under each of the two areas professional growth and development and professional leadership and/or initiative. These activities were further refined by a panel of teachers and administrators.

Validation of Activities. It is important to establish the content validity of the activities that were to be included for each goal. The objective of this step in the development process was to determine that each activity was undisputably a task that could be undertaken to work toward achieving the goal under which it had been identified. Developers were not attempting to define an exhaustive list of activities at this point in the project.

A "retranslation" process (Smith & Kendall, 1963) was used to establish that the activities were clear exemplars of the specific goal to which they were assigned. All activities were combined in random order. A panel of 10 professionals including teachers and administrators were asked to assign each activity to the goal that that activity best fit. Only those activities that were consistently assigned to a particular goal were

retained for the final instrument, thus, ensuring that the activities were indeed appropriate for each goal.

It is recognized that there are other activities that could be undertaken to achieve the identified goals. However, the current instrument was developed for the pilot study of the Kentucky Career Ladder. Part of the ongoing research on the goal setting instrument includes identifying and subsequently weighting additional activities for each goal.

Assignment of Weights to Goals. The essentiality ratings were combined with the difficulty ratings to establish relative weights for each goal in each area. The difficulty ratings were made on a 5-point Likert scale such that for each goal the respondent was asked to decide how difficult it would be to accomplish that goal and mark:

1 - if it would NOT be DIFFICULT to accomplish this goal. That is, little time or effort would be required.

3 - if it would be DIFFICULT to accomplish this goal. That is, considerable time and effort would be required.

5 - if it would be HIGHLY DIFFICULT to accomplish this goal. That is, it would require enormous amounts of time and effort.

Raters were instructed that difficulty ratings should be independent of the essentiality ratings. That is, a "USEFUL" (rating of 3) goal could be HIGHLY DIFFICULT (rating of 5) to achieve or it could be relatively easy to achieve (NOT DIFFICULT - rating of 1).

Weights were obtained for goals by converting the mean ratings for both essentiality and difficulty to standard Z-scores. The raw score mean for essentiality ratings across

all goals was 3.95 (SD=.369). The raw score mean for difficulty ratings across all goals was 2.37 (SD=.219). The standard scores were assigned unit weights ranging from 1 to 3 where a Z-score below -1 was assigned the weight of 1, a Z-score ranging from -1 to 1 was assigned a weight of 2, and a Z-score greater than 1 was assigned a weight of 3. The essentiality and difficulty weights were multiplied. Adjusted weights were obtained by capping these values so that no weight exceeded 4. The adjusted weights were used in the final instrument.

Assignment of Weights to Activities. Weights were developed for each activity under each goal following a procedure analogous to that used to establish weights for the goals. The weights were based on the responses of 825 teachers and administrators who rated each activity listed under the goal that might be accomplished by completing the activity. Raters were asked to evaluate how difficult it is to complete the activity and were instructed that their rating should reflect both the degree of effort and the amount of time required to complete the activity.

Weights for goal attainment activities were obtained by converting the mean ratings for difficulty for each activity under a given goal to standard Z-scores. The standard scores were assigned unit weights ranging from 1 to 4 where a Z-score below -1 was assigned the weight of 1, a Z-score ranging from -1 to 0 was assigned a weight of 2, a Z-score ranging from 0 to 1 was assigned a weight of 3, and a Z-score greater than 1 was

assigned a weight of 4. These values were used in the final instrument.

Design of the Instrument. A goal-setting instrument was developed for use by the principal and teachers with a set of instructions and recommendations. Goals were listed with their respective weights, followed by the activities validated under that goal. Because of teachers' initial reaction to the "numerical" weights, each of the activity weights was represented by "stars" on the instrument. According to the guidelines set forth in the original Kentucky Career Ladder Plan, teachers are required to attain a designated number of points for each step undertaken. To obtain the full point value for an area, the teacher must select a set of goals for that area whose weights sum to 10. Participants were instructed to complete a minimum of four activity stars under each selected goal in order to receive the points for that goal. Each goal set is designed to encompass a two-year period of time. A copy of the instrument is located in Appendix A for reference and clarification. The instrument format contains a listing of all goals, for both professional areas, with their respective activities.

An instrument, entitled the Goal Set Contract Summary, was designed for clarity and ease in tallying and checking point accumulation. Separate instruments were developed for professional growth and development and professional leadership and/or initiative. In addition, an Activity Summary sheet was developed and teachers were instructed to complete an Activity

Summary sheet for each goal and attach that summary before presenting the completed goal set to the principal. Goal Set Contract Summaries and Activity Summary sheets are appended (See Appendix A).

Design of the Process. An eight step goal setting process evolved as a necessary component related to actual implementation. The resulting process follows:

STEP 1 - Administrator training

STEP 2 - Orientation for all teachers and distribution of materials (building principal)

STEP 3 - Independently the teacher will tentatively select goals and activities

STEP 4 - Independently the principal will review the teacher's proposed goal set

STEP 5 - The teacher and principal meet and discuss the goal set. The goal set contract will be signed, dated, and approved by the superintendent.

STEP 6 - The teacher will carry out the goal set and/or discuss revisions as circumstances may develop. An "end of the first year progress register" will be completed and discussed with the principal.

STEP 7 - The teacher and principal will meet when all goals and activities are completed in order to discuss goal attainment.

STEP 8 - The teacher's three-member committee will meet and review the plan and evaluate the degree to which goals have been achieved.

Pre-pilot of the Process and Instrument. Simulations of principal/teacher goal setting conferences were conducted with four principals and four of their teachers in order to identify instrument and process shortcomings. Elementary, middle grades, high school, and special education teachers participated in the pre-pilot. The Professional Growth and Development--

Professional Leadership and/or Initiative Goal Setting Process outline is located in Appendix B.

Refinement. Revisions were made based on recommendations from all surveys, the steering committee panel, and the pre-pilot. As a result of the initial training sessions an End of the First Year Progress Register was added to the goal set process. The resultant instrument is located in Appendix C. It is speculated that additional refinement will be necessary as a result of the state-wide pilot.

State-wide Pilot of the Process and Instrument. Training programs for the pilot principals were conducted during the summer of 1986 in centralized locations. Training consisted of (a) an overview of the career ladder process, (b) an introduction to the goal setting instrument development process and the literature review, (c) an introduction to the goal setting instruments, process and forms, (d) a model for utilizing process objectives, and (e) training in conferencing skills. Each principal was required to pass a certification test with no less than a minimum score of 85%.

At the conclusion of the summer training sessions principals were instructed to orient pilot teachers to the process and materials and to provide the necessary materials for goal selection. The teachers were asked to tentatively select a goal set and appropriate activities. After the goal set is reviewed by the principal, the principal and teacher will meet and negotiate the goal set for submission to the superintendent for his approval. The teacher will then carry out the goal set

and/or negotiate revisions as circumstances may develop. At the end of the first year an End of the First Year Progress Register (Appendix C) will be completed, signed, and filed with the principal. At the conclusion of the pilot, the teacher and principal will meet and discuss goal attainment. The final requirement, as set forth in the original Career Ladder Plan, is the meeting of the teacher's three-member committee. The committee will meet and evaluate the product of the goal attainment effort and assign points based on accomplishments. The three-member committee will be comprised of the following: (1) the teacher's principal, (2) a state-paid, full-time evaluator, and (3) a peer teacher.

Summary and Conclusions

Due to the importance of professional growth and development and professional leadership/initiative in enhancing instructional practices and maintaining teachers within the profession, a systematic process for rewarding this type of growth is necessary. The need for consistency of reward in a state-wide career ladder type plan dictates a well-defined and well-organized procedure.

As a result of this study, goals and activities have been identified, validated, and weighted based on the evaluations of a representative sample of Kentucky teachers and administrators. In addition, an instrument and a process has been developed to enable principals and teachers to identify relevant goals, select activities specifically designed to meet

those goals, and undertake a goal setting/goal attainment contract.

The process in question emphasizes and takes into account the importance of goal setting and goal attainment which, though not extensively used in educational evaluation practices, has proven to be effective in other employment areas (Locke, et. al., 1981). Fundamental to the success of such a process is the relevance of goals. Participants must recognize goals as worthwhile and be willing to dedicate both time and effort toward their attainment.

Survey responses of Kentucky teachers and administrators indicated agreement regarding the importance of goals as evidenced by consistently high essentiality ratings. Consistent assignment of activities to particular goals indicated agreement that the activities did indeed relate to attainment of the goals in question. Thus, one may confidently conclude that the resultant instrument and process should offer a vehicle for attainment in the areas of professional growth and development and professional leadership and/or initiative.

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APPENDIX A

PROFESSIONAL GROWTH AND DEVELOPMENT - PROFESSIONAL LEADERSHIP AND/OR INITIATIVE GOAL SETTING PROCESS

STEP 1 - ADMINISTRATOR TRAINING

STEP 2 - ORIENTATION FOR ALL TEACHERS AND DISTRIBUTION OF MATERIALS (BUILDING PRINCIPAL)

STEP 3 - INDEPENDENTLY THE TEACHER WILL TENTATIVELY SELECT GOALS AND ACTIVITIES

STEP 4 - INDEPENDENTLY THE PRINCIPAL WILL REVIEW THE TEACHER'S PROPOSED GOAL SET

STEP 5 - THE TEACHER AND PRINCIPAL MEET AND DISCUSS THE GOAL SET. THE GOAL SET CONTRACT WILL BE SIGNED, DATED, AND APPROVED BY THE SUPERINTENDENT. (FOR PURPOSES OF THE PILOT PLEASE MAIL A COPY OF THE COMPLETED CONTRACT TO THE SITE COORDINATOR)

STEP 6 - THE TEACHER WILL CARRY OUT THE GOAL SET AND/OR DISCUSS REVISIONS AS CIRCUMSTANCES MAY DEVELOP. AN "END OF THE FIRST YEAR PROGRESS REGISTER" WILL BE COMPLETED AND DISCUSSED WITH THE PRINCIPAL. (FOR PURPOSES OF THE PILOT PLEASE MAIL A COPY OF THE COMPLETED PROGRESS REGISTER TO THE SITE COORDINATOR)

STEP 7 - THE TEACHER AND PRINCIPAL WILL MEET WHEN ALL GOALS AND ACTIVITIES ARE COMPLETED IN ORDER TO DISCUSS GOAL ATTAINMENT.

STEP 8 - THE TEACHER'S THREE MEMBER COMMITTEE* WILL MEET AND REVIEW THE PLAN AND EVALUATE THE DEGREE TO WHICH GOALS HAVE BEEN ACHIEVED.

*EACH TEACHER'S COMMITTEE SHALL BE COMPOSED OF THE FOLLOWING:

(1) THE TEACHER'S PRINCIPAL
(2) A STATE-PAID, FULL-TIME EVALUATOR
(3) A TRAINED EVALUATOR (PEER TEACHER, UNIVERSITY FACULTY MEMBER, INSTRUCTIONAL SUPERVISOR, DEPARTMENT CHAIRPERSON, OR RETIRED TEACHER)

APPENDIX B

PROFESSIONAL GROWTH AND DEVELOPMENT

GOAL SETTING INSTRUMENT

PROFESSIONAL GROWTH AND DEVELOPMENT

Professional Growth and Development is defined as: The ability and willingness to undertake self-improvement activities related to increasing one's professional knowledge and skills as demonstrated through performance on the job.

Teachers are required to attain ten (10) professional growth points for career ladder Step 3 and another ten (10) professional growth points for career ladder Step 4.

In order to receive credit for attaining a goal, a teacher must complete a minimum of four (4) activity stars listed under that goal. The following are general considerations concerning goals and activities:

1. Activities were assigned stars based on a validation process identifying activities with specific goals. Therefore, transferring activities from one goal to another would invalidate the weighting of that activity and is not advised.
2. Additional activities that might be proposed should be incorporated only after a validation process similar to the one used for weighting the original goals is conducted by the Career Ladder Commission.
3. Partial fulfillment of any goal is not advised and would invalidate attainment of any meaningful goal set.

PROFESSIONAL GROWTH AND DEVELOPMENT GOALS, LEADERSHIP POINTS, ACTIVITIES, AND ACTIVITY STARS

Goal A. TO IMPROVE PERSONAL DIAGNOSIS AND EVALUATION SKILLS IN ORDER TO ASCERTAIN INSTRUCTIONAL LEVELS AND NEEDS OF LEARNERS (6 professional growth points)

****	1.	Develop specific tests to determine instructional levels and/or prerequisite needs of learners
****	2.	Take coursework in measurement and/or testing
**	3.	Attend workshops/seminars in measurement and/or testing
**	4.	Utilize published diagnostic materials, such as achievement tests, to analyze individual learner needs
*	5.	Read testing manuals and/or other published materials about testing
*	6.	Use informal methods, such as classroom observation, to assess individual learner needs

Goal B. TO ADAPT INSTRUCTIONAL TECHNIQUES TO THE DEMONSTRATED INSTRUCTIONAL NEEDS OF THE INDIVIDUAL STUDENT (6 professional growth points)

****	1.	Develop an individualized educational plan for specific students with differing needs
****	2.	Develop strategies for dealing with students displaying various behavioral characteristics
**	3.	Team teach a lesson for the benefit of a special group of students
**	4.	Utilize several teaching styles in the course of one lesson in order to reach students with different learning styles

Goal C. TO INCREASE UNDERSTANDINGS OF CURRENT CONCEPTS AND THEORIES AS THEY RELATE TO THE TEACHER'S SUBJECT AREA AND JOB ASSIGNMENT (4 professional growth points)

**** 1. Develop a position paper on new techniques used in the classroom
**** 2. Develop a catalog of new ideas on instructional techniques and their respective sources
*** 3. Develop lesson plans on new facets of one's subject area
* 4. Read professional literature from professional associations focusing on the teaching of specific subject areas

Goal D. TO IMPROVE CLASSROOM MANAGEMENT AND ORGANIZATIONAL SKILLS (4 professional growth points)

**** 1. Take advanced coursework in courses pertaining to classroom management/discipline
*** 2. Modify classroom management/discipline strategies to be consistent with current knowledge
*** 3. Incorporate management techniques into planning for classroom interactions and structure
* 4. Attend a training session on classroom management
* 5. Develop an awareness of recent literature on classroom management

Goal E. TO INCREASE INTERPERSONAL AND COMMUNICATION SKILLS (3 professional growth points)

*** 1. Gain an understanding of individual interpersonal styles of operation of students and other faculty members
** 2. Discuss literature pertaining to interpersonal communication skills with colleagues
** 3. Attend workshops, skill development seminars, etc. which focus upon the use of interpersonal skills
** 4. Review books, articles, etc. which pertain to interpersonal communication skills
* 5. Develop an increased understanding of one's own personal style of teaching and interacting with others

Goal F. TO INCREASE UNDERSTANDINGS OF DIFFERENT SOCIO-ECONOMIC, ETHNIC, AND CULTURAL GROUPS (3 professional growth points)

** 1. Participate in a training session on minority group
** 2. Invite guest speakers to the classroom who represent minority groups

GOAL G. TO PURSUE GRADUATE DEGREE(S) AND/OR RECEIVE COURSE CREDIT DIRECTLY RELATED TO THE INDIVIDUAL TEACHER'S ASSIGNMENT (3 professional growth points)

**** 1. Take content specific advanced coursework dealing with instructional techniques in the content/subject matter area
**** 2. Complete graduate level college coursework directly related to the current teaching assignment
** 3. Complete short courses offered by universities or certification groups
** 4. Complete undergraduate level college coursework directly related to the current teaching assignment

Goal H. TO ATTEND WORKSHOPS, SEMINARS, AND/OR PROFESSIONAL DEVELOPMENT ACTIVITIES DIRECTLY RELATED TO THE INDIVIDUAL TEACHER'S ASSIGNMENT (3 professional growth points)

***	1.	Actively participate in professional development activities related to the teaching professional
**	2.	Attend professional development activities related to the teaching assignment
**	3.	Audit a class related to one's assignment
**	4.	Complete short courses offered by universities or certification groups
*	5.	Participate in a training session related to the teacher's content area assignment
*	6.	Attend meetings of professional organizations related to one's assignment

Goal I. TO TRY NEW METHODS/APPROACHES IN THE CLASSROOM AND EVALUATE THEIR SUCCESS (2 professional growth points)

****	1.	Develop, implement, and evaluate a classroom instructional multi-media program
***	2.	Develop and implement a plan designed to evaluate the effectiveness of new methods
**	3.	Develop, implement, and evaluate a model lesson
**	4.	Develop a rationale for the use of new techniques in one's instruction
*	5.	Discuss with colleagues the results of a new method used in one's own classroom

Goal J. TO INCORPORATE KNOWLEDGE OF CURRENT EDUCATIONAL RESEARCH AND DEVELOPMENT INTO INSTRUCTIONAL PRACTICES BY USING IDEAS FROM PROFESSIONAL BOOKS, JOURNALS, AND/OR PROFESSIONAL ORGANIZATIONS (2 rofessional growth points)

****	1.	Develop a catalog of new ideas on instructional techniques and their respective sources
****	2.	Write a grant proposal for classroom modifications based on current professional literature
**	3.	Implement new instructional methodology based on new information
**	4.	Write and implement a model lesson plan
**	5.	Integrate new ideas from various sources into one's present instructional strategies
**	6.	Use materials from a current educational publication in developing and teaching a lesson
**	7.	Develop new lesson plans based on professional literature
**	8.	Develop lesson plans on new facets of one's teaching assignment

Goal K. TO DEVELOP, IMPLEMENT, AND VERBALIZE A PERSONAL EDUCATIONAL PHILOSOPHY CONSISTENT WITH CURRENT KNOWLEDGE (2 professional growth points)

****	1.	Develop a position paper on new techniques used in the classroom
**	2.	Develop, summarize, and discuss a professional belief/ philosophy in an interview
*	3.	Modify instructional strategies to better fit one's educational philosophy
*	4.	Develop a written analysis of one's personal beliefs or philosophy regarding the educational process
*	5.	Demonstrate how behavior in the classroom is consistent with stated educational philosophy

Goal L. TO SEEK AND UTILIZE COMMUNITY RESOURCES TO ENHANCE CLASSROOM INSTRUCTION (1 professional growth point)

****	1.	Develop a catalog of community resources to aid in instruction
****	2.	Write a proposal for obtaining civic support for a special project
***	3.	Participate in community organizations in order to enhance instruction
***	4.	Use various resources and describe how they enhanced instruction
*	5.	Invite classroom speakers for class presentations

GOAL SET CONTRACT SUMMARY

Professional Growth and Development

Career Ladder Step 3/4 (Circle one).

GOAL _____ . . . . . Professional Growth Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total 4

GOAL _____ . . . . . Professional Growth Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total 4

GOAL _____ . . . . . Professional Growth Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total 4

GOAL _____ . . . . . Professional Growth Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total 4

GOAL _____ . . . . . Professional Growth Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total 4

Professional Growth and Development Total 10

NOTE: An activity summary sheet for each goal must be attached before the goal set is presented to the principal for the preconference review.

Teacher's Signature _____ Date _____

Principal's Signature _____ Date _____

Contract's Beginning Date _____ Ending Date _____

Comments:

ACTIVITY SUMMARY SHEET for CATEGORY_____GOAL_____

ACTIVITY _____

Describe the specific nature of the proposed activity.

How will successful completion of this activity be determined?

When will the activity be completed?

ACTIVITY _____

Describe the specific nature of the proposed activity.

How will successful completion of this activity be determined?

When will the activity be completed?

ACTIVITY _____

Describe the specific nature of the proposed activity.

How will successful completion of this activity be determined?

When will the activity be completed?

PROFESSIONAL GROWTH AND DEVELOPMENT

GOAL SETTING INSTRUMENT

PROFESSIONAL LEADERSHIP AND/OR INITIATIVE

Professional Leadership and/or Initiative is defined as: The ability and willingness to effectively use one's knowledge and skills through conducting or engaging in activities designed to facilitate the development of curricula, other professionals, and student and community programs.

Teachers are required to attain ten (10) professional leadership points for career ladder Step 3 and another twenty (20) professional leadership points for career ladder Step 4.

In order to receive credit for attaining a goal, a teacher must complete a minimum of four (4) activity stars listed under that goal. The following are considerations concerning goals and activities:

1. Activities were assigned stars based on a validation process identifying activities with specific goals. Therefore, transferring activities from one goal to another would invalidate the weighting of that activity and is not advised.
2. Additional activities that might be proposed should be incorporated only after a validation process similar to the one used for weighting the original goals is conducted by the Career Ladder Commission.
3. Partial fulfillment of any goal is not advised and would invalidate attainment of any meaningful goal set.
4. Activities cannot be counted more than once.

PROFESSIONAL LEADERSHIP AND/OR INITIATIVE GOALS, LEADERSHIP POINTS, ACTIVITIES, AND ACTIVITY STARS

Goal A. TO PROMOTE PARENT/COMMUNITY INTEREST IN THE SCHOOL (6 professional leadership points)

- *** 1. Assume a leadership role in the school's parent/teacher organization
- * 2. Provide community speakers for classroom experience
- * 3. Participate in the parent/teacher organization

Goal B. TO CREATE MATERIALS OR PROGRAMS AND SHARE WITH PEERS AND/OR ADMINISTRATORS (5 professional leadership points)

- **** 1. Develop a professional multi-media presentation
- **** 2. Write a model curriculum
- **** 3. Develop a resource booklet of materials to be shared with colleagues
- **** 4. Develop a professional videotape presentation
- **** 5. Develop and present problem solving strategies with peers
- **** 6. Write a grant proposal
- **** 7. Conduct a research project
- **** 8. Write a professional article
- **** 9. Write a professional book
- **** 10. Write a proposal for change in the school

Goal C. TO CONDUCT WORKSHOPS OR TRAINING SESSIONS DESIGNED TO INCREASE KNOWLEDGE AND SKILLS OF OTHERS (4 professional leadership points)

**** 1. Present a workshop for another district
**** 2. Present a workshop for the State Department of Education
**** 3. Present a workshop at a state meeting
**** 4. Present a workshop at a national meeting
** 5. Develop and conduct a workshop and/or seminar for colleagues in one's own school
** 6. Present a workshop in one's school system

Goal D. TO TAKE AN ACTIVE ROLE IN THE IDENTIFICATION AND RESOLUTION OF INSTRUCTIONAL PROBLEMS AND OTHER SCHOOL-RELATED PROBLEMS (4 professional leadership points)

**** 1. Write a proposal for change in the school
** 2. Share problem solving strategies with peers
** 3. Serve as chairperson of a school problem solving committee
** 4. Serve on a school problem solving committee
** 5. Serve as an active member of a school-based committee
** 6. Serve as an active member of an accrediation committee in one's own school

Goal E. TO ASSIST IN ESTABLISHING SCHOOL GOALS AND TAKE AN ACTIVE ROLE IN ACHIEVING THEM (4 professional leadership points)

** 1. Serve as an active member of a school-based committee
** 2. Serve as chairperson of a committee to develop school goals
** 3. Serve as an active member of a committee to develop school goals

Goal F. TO INITIATE AND IMPLEMENT ACTIVITIES AND PROJECTS IN THE SCHOOL (3 professional leadership points)

**** 1. Conduct a research project
**** 2. Develop a grant proposal to provide additional school programs
*** 3. Direct school academic teams
** 4. Develop a proposal for extra school programs
** 5. Coordinate a school activity
** 6. Assist in directing school academic teams
* 7. Participate on special project committees

Goal G. TO WORK COOPERATIVELY WITH PEERS, ADMINISTRATORS, AND COMMUNITY MEMBERS IN PLANNING, AND IMPLEMENTING CURRICULAR AND EXTRA-CURRICULAR ACTIVITIES (3 professional leadership points)

**** 1. Develop a grant project for extra school programs
**** 2. Develop a proposal for extra school programs
*** 3. Direct school academic teams
*** 4. Serve as chairperson of a curriculum development committee
** 5. Coordinate a school activity
** 6. Initiate a school activity
** 7. Coordinate extra-curricular student activities
** 8. Assist in directing school academic teams
* 9. Serve as an active member of a planning group for academic programs
* 10. Participate in a curriculum development committee

Goal H. TO PROVIDE A LEADERSHIP MODEL AND FOSTER PROFESSIONALISM THROUGH DEMONSTRATING/MODELING LEADERSHIP TECHNIQUES (3 professional leadership points)

**** 1. Write a model curriculum
**** 2. Present a workshop at a state meeting
** 3. Assist in directing school academic teams
** 4. Serve as an active member of a state committee
** 5. Serve as an active member of a professional organization at the local level

Goal I. TO EFFECTIVELY SERVE IN A LEADERSHIP POSITION IN THE SCHOOL, DISTRICT, AND/OR PROFESSIONAL ORGANIZATION (2 professional leadership points)

**** 1. Serve as chairperson or member of a state committee
**** 2. Serve as officer of a professional organization at the state/regional level
**** 3. Serve as chairperson of an accreditation team in another school
*** 4. Assume a leadership role in a professional organization
*** 5. Serve as an active member of an accreditation team in another school
** 6. Serve as chairperson of a school system committee
** 7. Serve as chairperson of a school-based committee
** 8. Serve as chairperson of a planning group for academic programs
** 9. Serve as chairperson of a school curricular committee
** 10. Serve as chairperson of an accreditation team in one's own school
** 11. Serve as officer of a professional organization at the local level
** 12. Serve as chairperson on a special project committee

* 13. Serve as an active member of an accreditation team in one's own school
* 14. Serve as an active member of a school system committee
* 15. Serve as an active member of a professional organization at the state/regional level

GOAL J. TO FOSTER THE DEVELOPMENT OF LEADERSHIP SKILLS FOR STUDENTS IN THE CLASSROOM THROUGH DEMONSTRATING A PERSONAL LEADERSHIP MODEL (1 professional leadership point)

** 1. Develop and present a lesson on leadership in the classroom
** 2. Demonstrate leadership roles in the classroom

APPENDIX C

ACTIVITY SUMMARY SHEET for CATEGORY_____GOAL_____

ACTIVITY _____

Describe the specific nature of the proposed activity.

How will successful completion of this activity be determined?

When will the activity be completed?

ACTIVITY _____

Describe the specific nature of the proposed activity.

How will successful completion of this activity be determined?

When will the activity be completed?

ACTIVITY _____

Describe the specific nature of the proposed activity.

How will successful completion of this activity be determined?

When will the activity be completed?

GOAL SET CONTRACT SUMMARY

Professional Leadership and/or Initiative

Career Ladder Step 3/4 (Circle one).

GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total _____ ÷

GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total _____ ÷

GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
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Total _____ ÷

GOAL _____ . . . . . Professional Leadership Points _____

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GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
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GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
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Total _____ ÷

GOAL _____ . . . . . Professional Leadership Points _____

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Total _____ ÷

GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
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Total _____ ÷

GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total _____ ÷

GOAL _____ . . . . . Professional Leadership Points _____

ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
ACTIVITY _____ Activity Star Value _____
Total _____ ÷

Professional Leadership and/or Initiative Total (Circle) 10/20

NOTE: An activity summary sheet for each goal must be attached before the goal set is presented to the principal for the preconference review.

Teacher's Signature _____ Date _____

Principal's Signature _____ Date _____

Contract's Beginning Date _____ Ending Date _____

NAME_____

DATE_____

END OF FIRST YEAR PROGRESS REGISTER

COMPLETE THIS FORM AFTER THE 2-YEAR GOAL SET HAS BEEN COMPLETED AND SIGNED. AT THE END OF THE FIRST YEAR DISCUSS PROJECTED ACTIVITIES IN TERMS OF COMPLETION AND PROGRESS TOWARD GOAL COMPLETION. ALL INFORMATION SHOULD COME FROM THE GOAL CONTRACT.

PROFESSIONAL GROWTH AND DEVELOPMENT

LIST EACH PROPOSED GOAL AND ACTIVITY (ACCORDING TO LETTER AND NUMBER)	INDICATE WHEN EACH ACTIVITY IS PROJECTED FOR COMPLETION AND CHECK IN THE SPACE PROVIDED AS ACTIVITIES ARE COMPLETED							
	FIRST YEAR				SECOND YEAR			
	FALL		SPRING		FALL		SPRING	
	PROJECTED	COMPLETED	PROJECTED	COMPLETED	PROJECTED	COMPLETED	PROJECTED	COMPLETED
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								

PROFESSIONAL LEADERSHIP AND/OR INITIATIVE

LIST EACH PROPOSED GOAL AND ACTIVITY (ACCORDING TO LETTER AND NUMBER)	INDICATE WHEN EACH ACTIVITY IS PROJECTED FOR COMPLETION AND CHECK IN THE SPACE PROVIDED AS ACTIVITIES ARE COMPLETED							
	FIRST YEAR				SECOND YEAR			
	FALL		SPRING		FALL		SPRING	
	PROJECTED	COMPLETED	PROJECTED	COMPLETED	PROJECTED	COMPLETED	PROJECTED	COMPLETED
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								
GOAL ____ ACTIVITIES _____								